

## Purpose





The purpose of this work instruction is to navigate MIDAS CRM.

## Trigger


Perform this procedure when you access MIDAS CRM.

## Helpful Hints

- "xxxx" within a document represents a variable, which may consist of a name, number, etc.
- In the field description tables, **R** indicates the action is required, **O** indicates the action is optional, and **C** indicates the action is conditional.
- The following notes may be used throughout this work instruction:

Note type	Icon	Description
A <b>general</b> note of information		This is the most commonly used note icon. It is the default icon in the uPerform system for all notes. Use this icon for general information that falls out of the scope of these other icons.
A <b>cautionary</b> note		Use this note to communicate to the end-user of something that <b>MUST</b> be completed or another trigger that should be started and is related to the procedure.
A <b>critical</b> note		Use this note to specify something that <b>MUST NOT</b> be done during the procedure.
<b>Contact</b> someone		Use this icon to specify to the end-user the need to initiate a communication within the organization due to an event in the procedure.



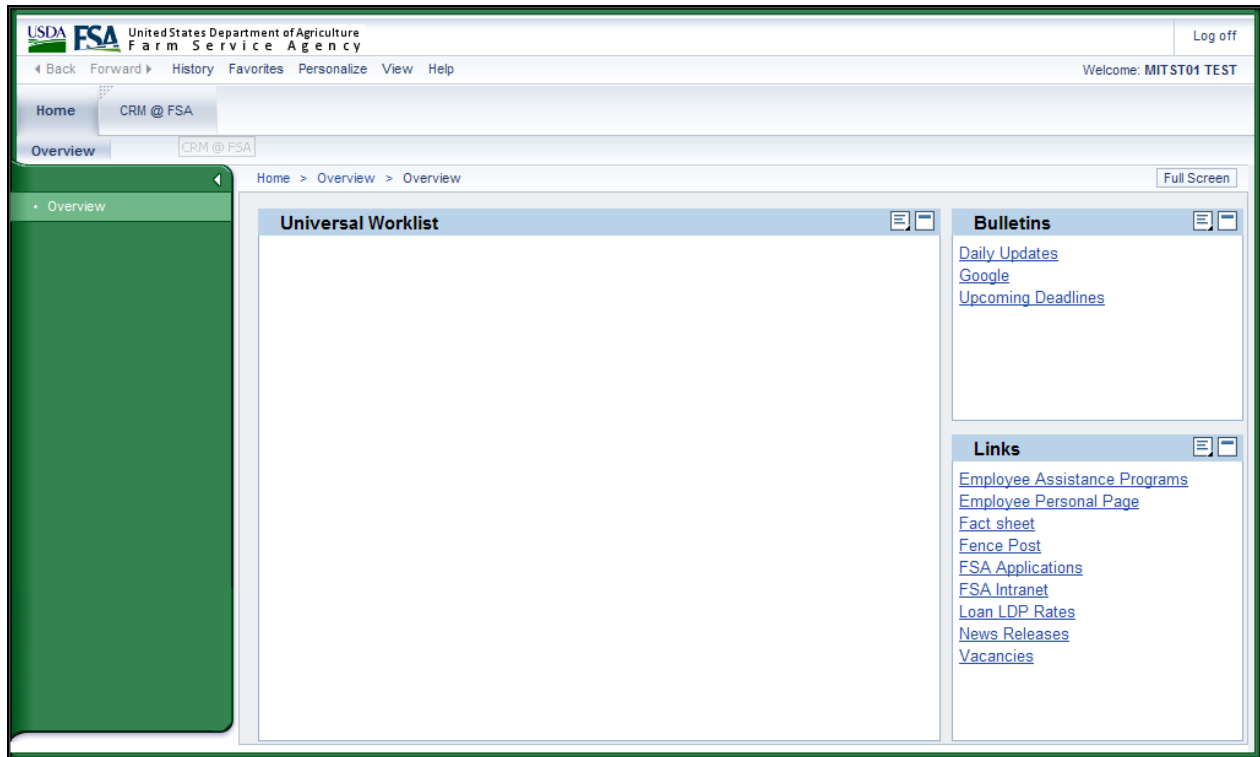
<p>A <b>reference</b> is available</p>		<p>Use this note to specify that more information is available in another location. You may reference SOPs, another system, or document.</p>
--	---	--



## Procedure

1. {Start the transaction from the MIDAS CRM Home Page.}

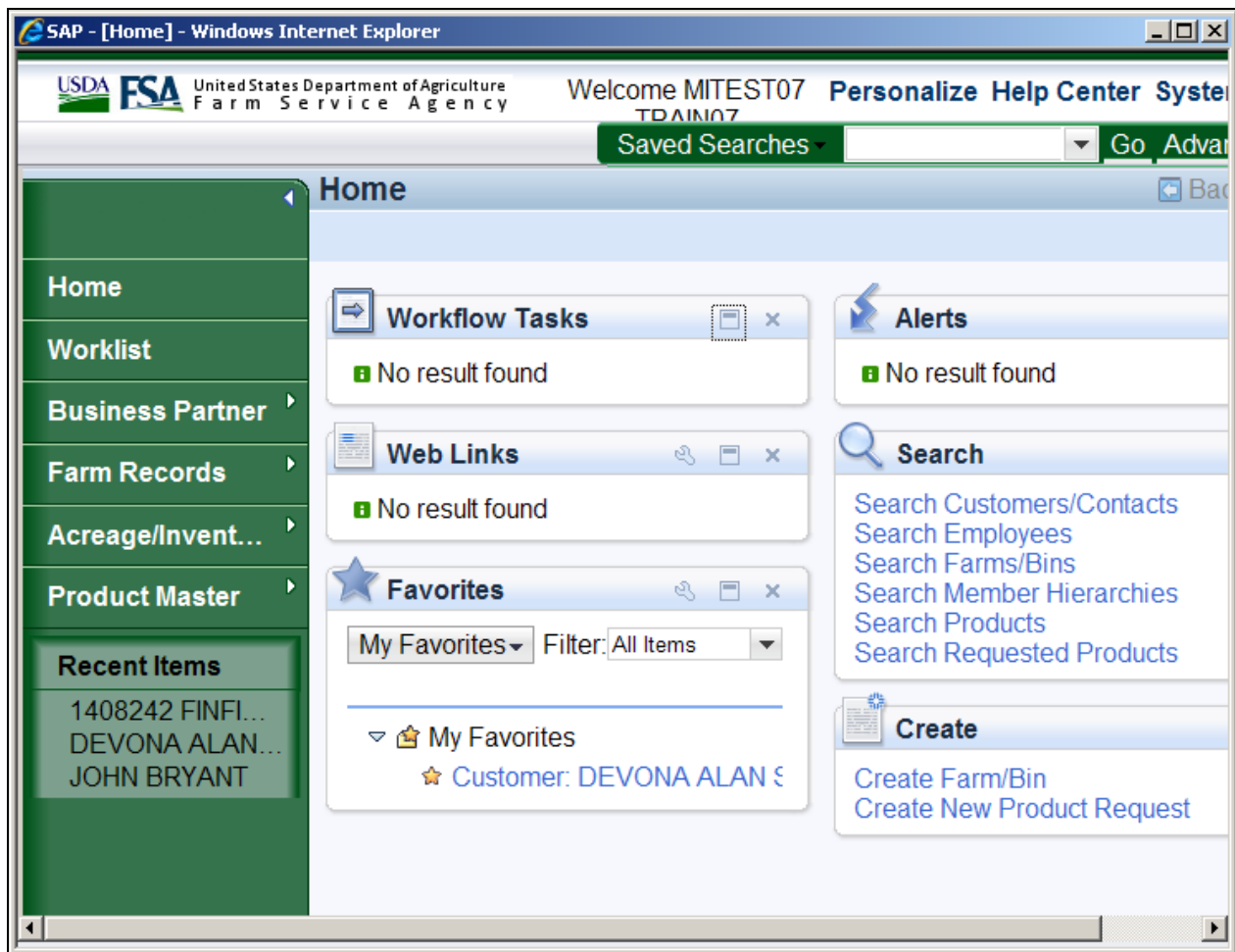
### MIDAS Portal - CRM@FSA



2. Click CRM @ FSA  tab to access the CRM Homepage



## MIDAS CRM Homepage



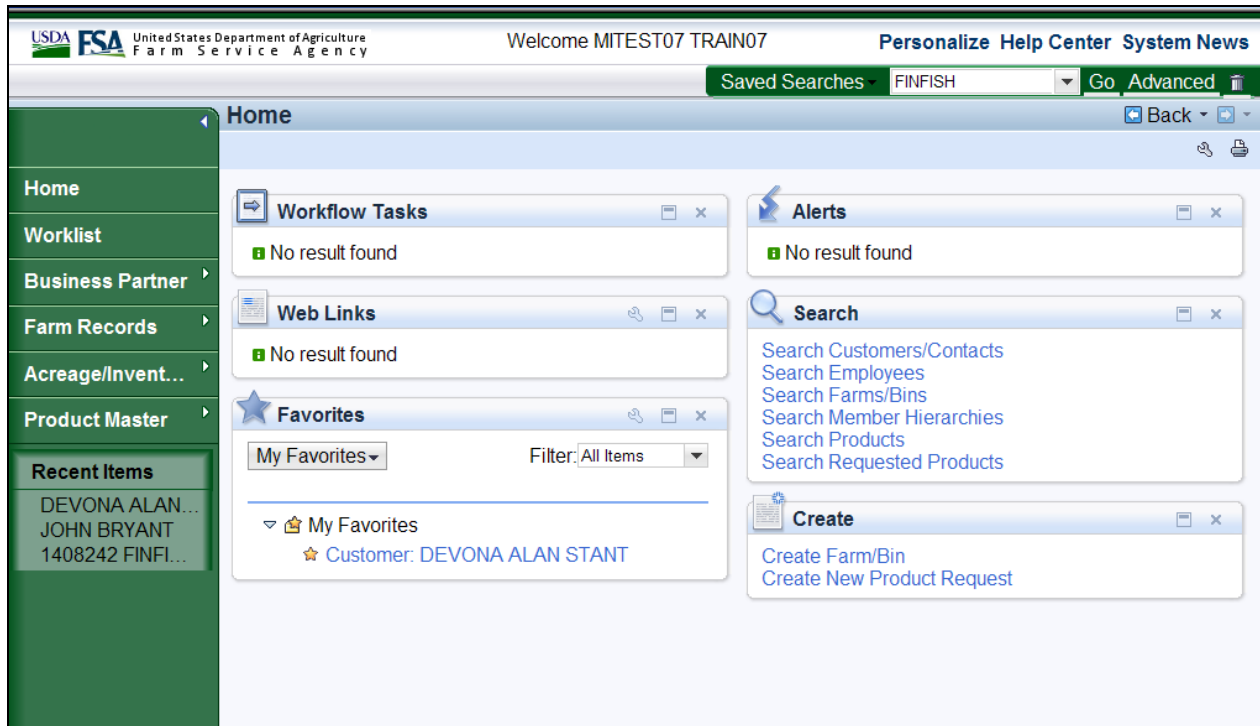
- Click Maximize button




CRM will open in a new minimized browser



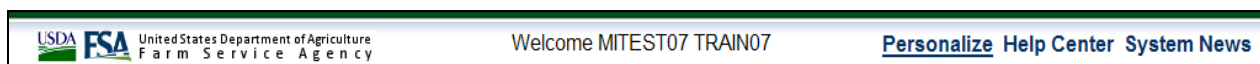
## MIDAS CRM Homepage - Header




4. Click Home  button.

 The Header Area contains the Masthead with the USDA FSA logos; the Welcome which confirms your log on; the Header tool bar; saved searches and the Show History or Back/Forward navigation.

## MIDAS CRM - Personalization Link in Header Tool Bar

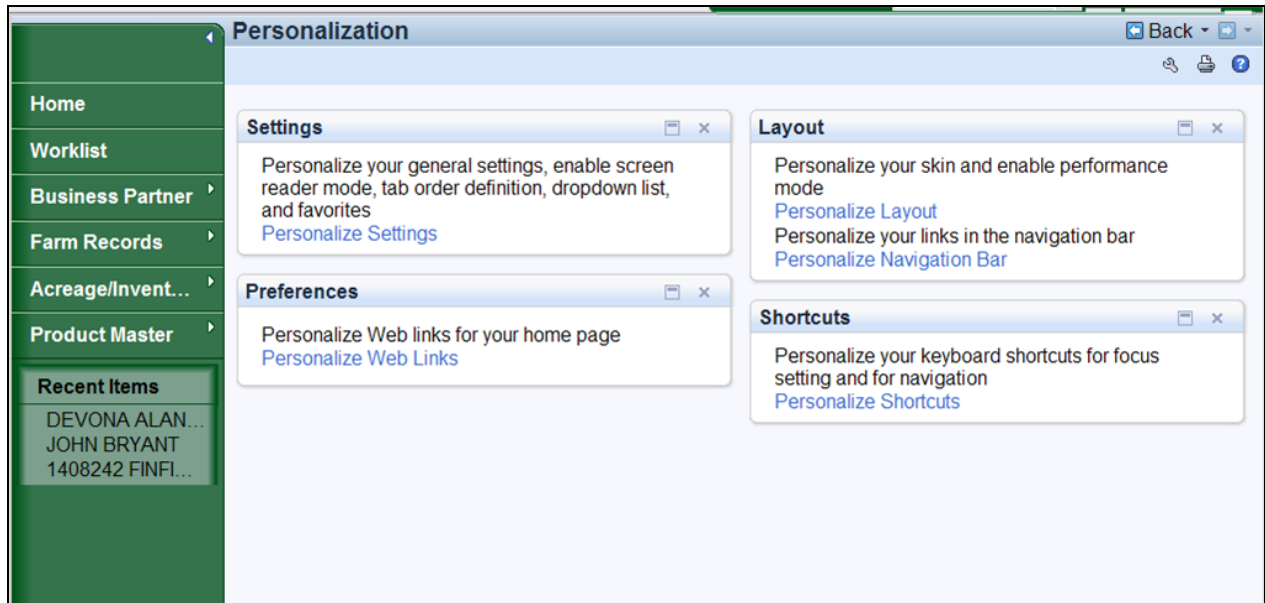


5. Let's review the Header Tool Bar, Click the Personalize [Personalize](#) link.

 Personalization, also symbolized by the wrench icon, allows you to adjust settings in MIDAS CRM to create the best work environment for you.



## MIDAS CRM - Personalization



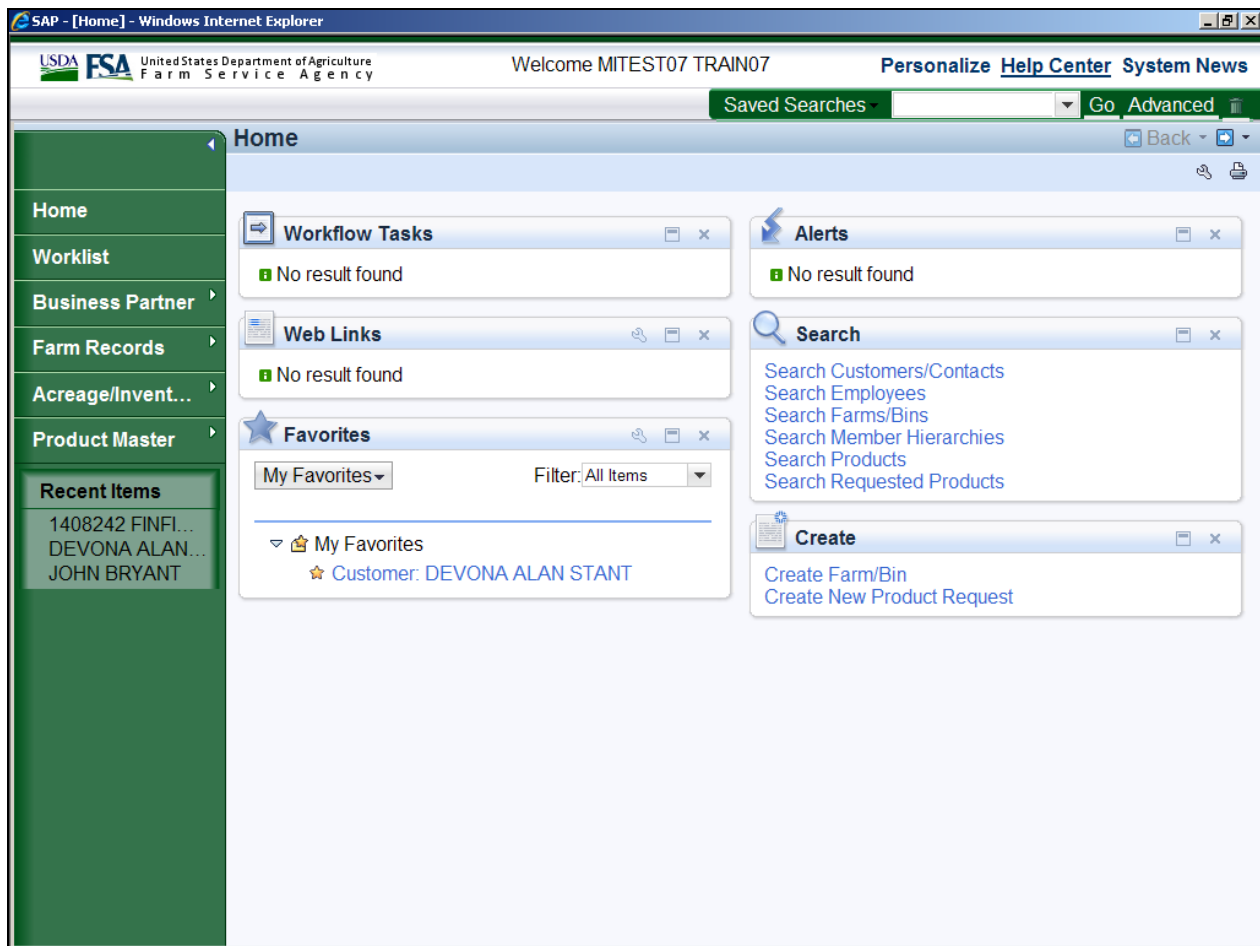
6. Click the Back  button to return to the homepage.



The Show History or Back Button works like the Back button on an internet browser. You must use the CRM Back button, using the internet browser navigation buttons will disrupt your session.



## MIDAS CRM - Help Center Link in Header Tool Bar



- Click Help Center [Help Center](#) link.



The Help Center link will access the Training Simulations and Work Instructions.



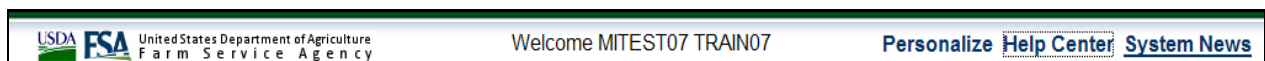
## MIDAS CRM - Help Center Browser



8. Click Close button

The Help Center will open in a new minimized browser.

## MIDAS CRM - System News Link in Header Tool Bar

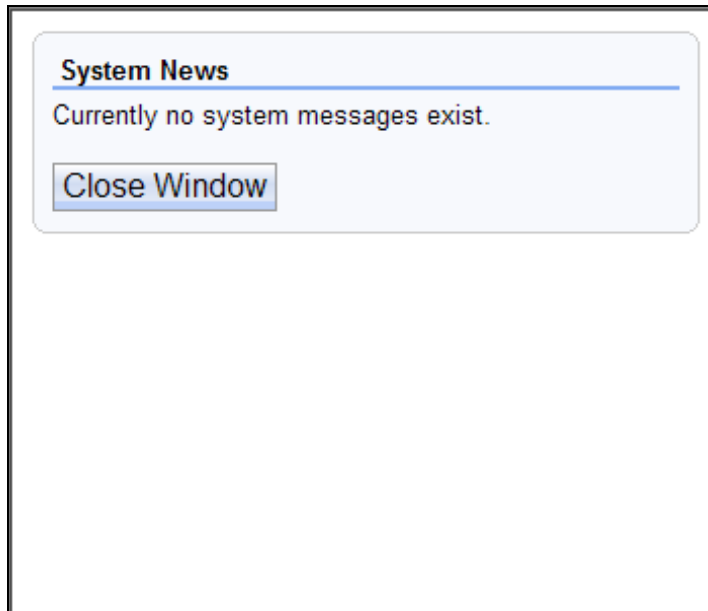


9. Click System News [System News](#) link.





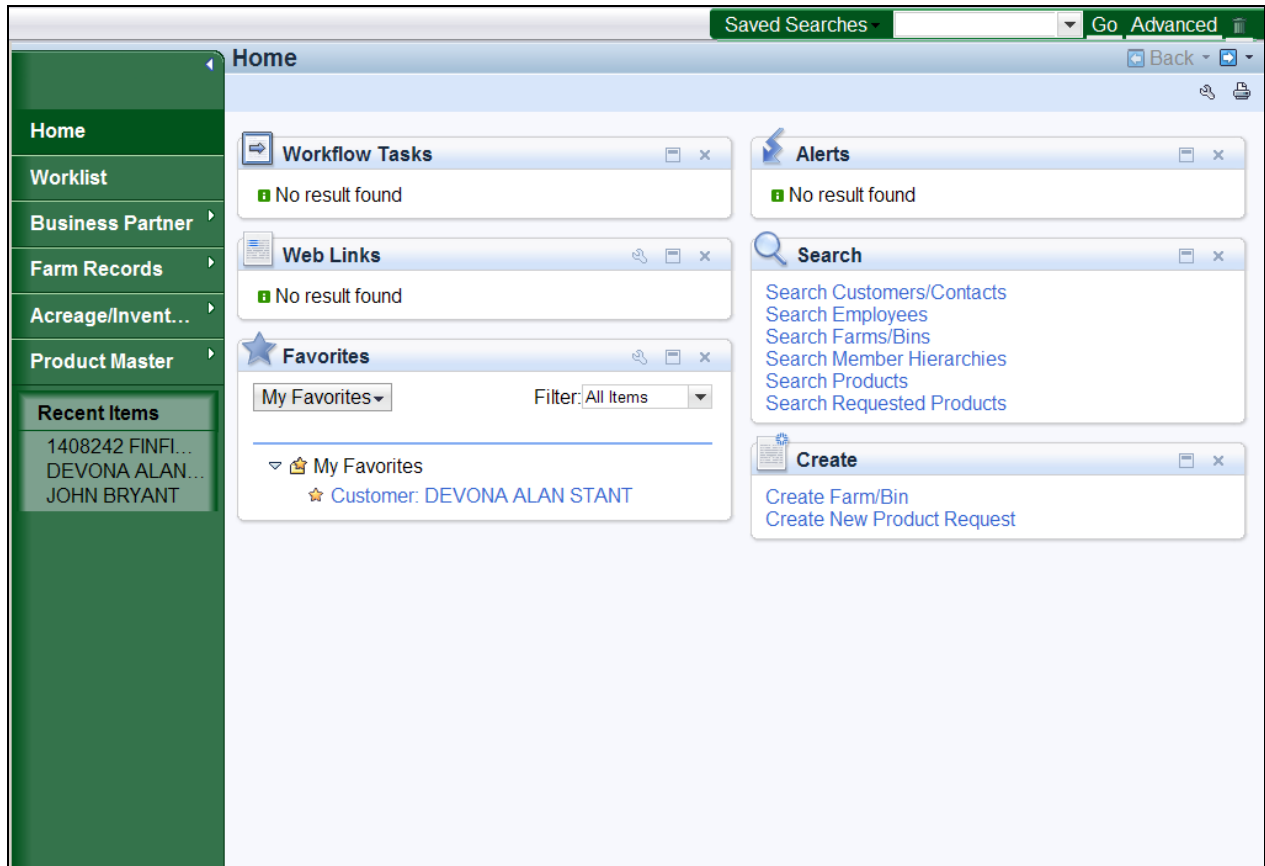
## MIDAS CRM - System News








10. Click Close Window  button.



## MIDAS CRM - Navigation Bar



11. Click Home  button.  
 The Navigation Bar offers access to the business processes.
12. Click button  to access second tier navigation.  
 Second tier navigation is a short cut to Search screens
13. Click Search Customers/Contacts  
 link.



## MIDAS CRM - Search: Customers

Search: Customers

Search Criteria [Hide Search Fields](#)

Search for: All Accounts

Business Name	is		
First Name	is		
Last Name	is		
Middle Name	is		
Common Customer Name	is		
BP Number/ID	is		
Role	is		
Tax ID Number	is		
Tax ID Type	is		
Associated State	is	INDIANA	
Associated County	is	ALL COUNTIES	
Service Center	is	ALL CENTERS	

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

Result List

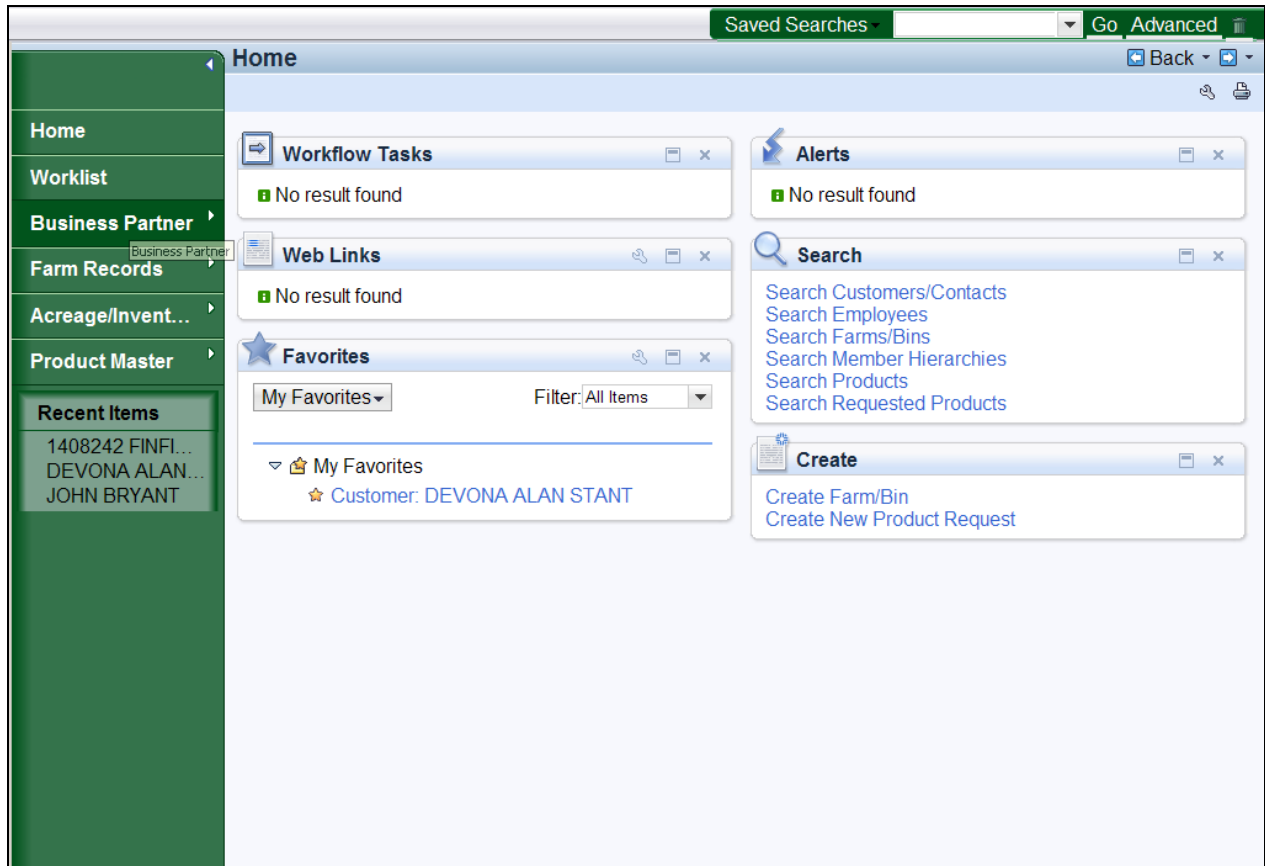
New Customer

In...	BP...	Common Custom...	Tax ID...	Tax ID...	Add...	City	State	ZIP...	Tel...	E-...
-------	-------	------------------	-----------	-----------	--------	------	-------	--------	--------	-------


14. Click Back Back button.



## MIDAS CRM - Navigation Bar

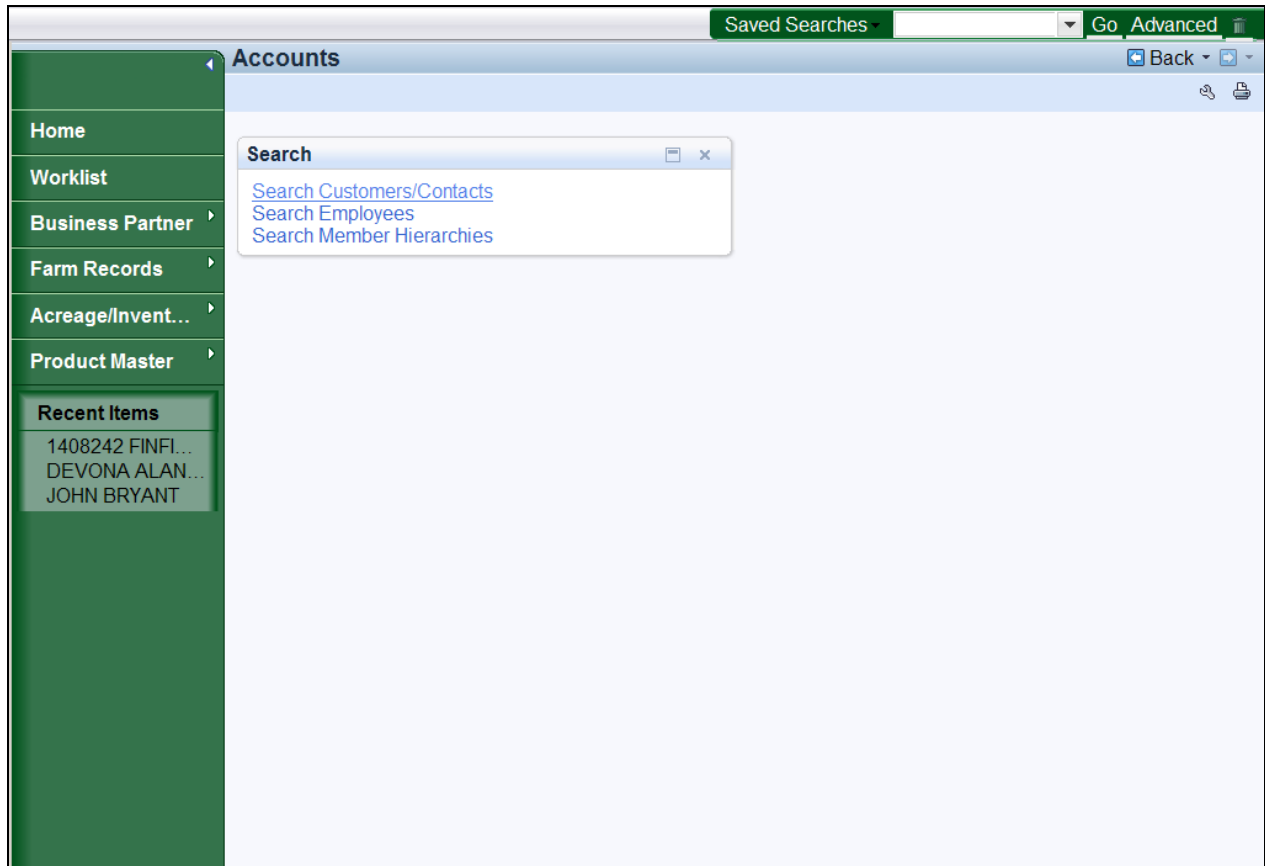


15. Click Business Partner **Business Partner** button.

 Click the Business Process button to access Search on the Work Area Page.

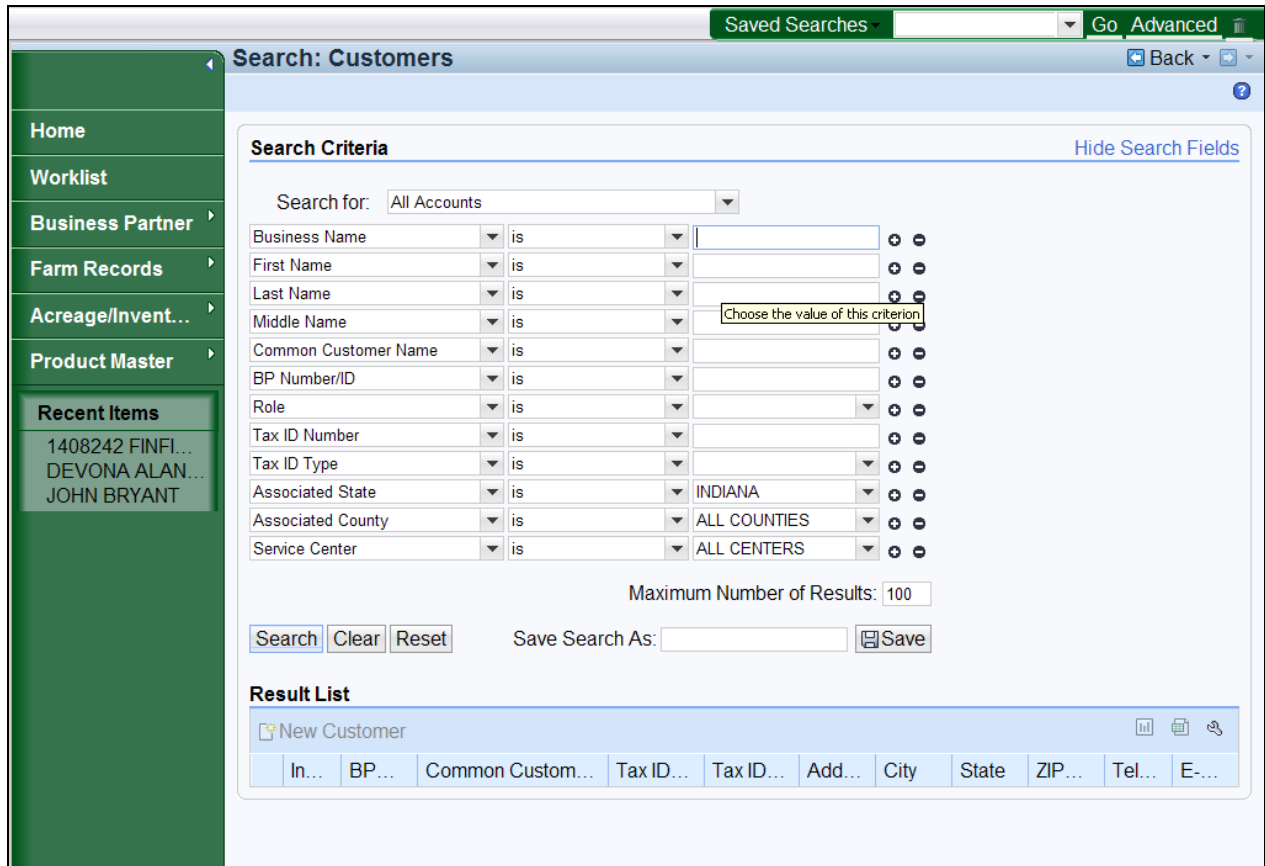


## MIDAS CRM - Accounts



16. Click Search Customers/Contacts [Search Customers/Contacts](#) link.

## Search: Customers



**Search: Customers**

Search Criteria

Search for: All Accounts

Business Name is [ ]

First Name is [ ]

Last Name is [ ]

Middle Name is [ ]

Common Customer Name is [ ]

BP Number/ID is [ ]

Role is [ ]

Tax ID Number is [ ]

Tax ID Type is [ ]

Associated State is [ INDIANA ]

Associated County is [ ALL COUNTIES ]

Service Center is [ ALL CENTERS ]

Maximum Number of Results: 100

Search Clear Reset Save Search As: Save

**Result List**

New Customer

In...	BP...	Common Custom...	Tax ID...	Tax ID...	Add...	City	State	ZIP...	Tel...	E-...
-------	-------	------------------	-----------	-----------	--------	------	-------	--------	--------	-------

17. As required, complete/review the following fields:

Field	R/O/C	Description
Last Name	R	<b>Example:</b> Bryant

18. Click JOHN BRYANT [JOHN BRYANT](#) link.



Select the hyperlink in the search results to view the Customer details



## Customer: JOHN BRYANT

Customer: JOHN BRYANT

Save | Cancel | Fact Sheet | PDF Fact Sheet | More+

Customer Details | Customer Profile | Roles | Identification Numbers

General Data

Current Role: Individual  
 BP Number /ID: 8000003...  
 Prefix:  
 First Name: JOHN  
 Middle Name:  
 Last Name: BRYANT  
 Suffix:  
 Last Name at Bi...  
 Legal Name: No  
 Common Custo... JOHN BRYANT  
 Language Prefe... English  
 Data Origin: SCIMS  
 Employee Type: Not an employee  
 Tax ID Type: No Tax ID Type  
 Tax ID Number: No Tax I...

Main Address and Communication Data

Information Line:  
 Address Line: 4973 Main St.  
 PO Box:  
 City: FREDERICK  
 State: MD Maryland  
 ZIP Code: 21704-6...  
 Country: US USA  
 Telephone Num..  
 E-Mail Address:  
 Communication.. Post (letter)

Notes

19. Click Customer Details **Customer Details** link.

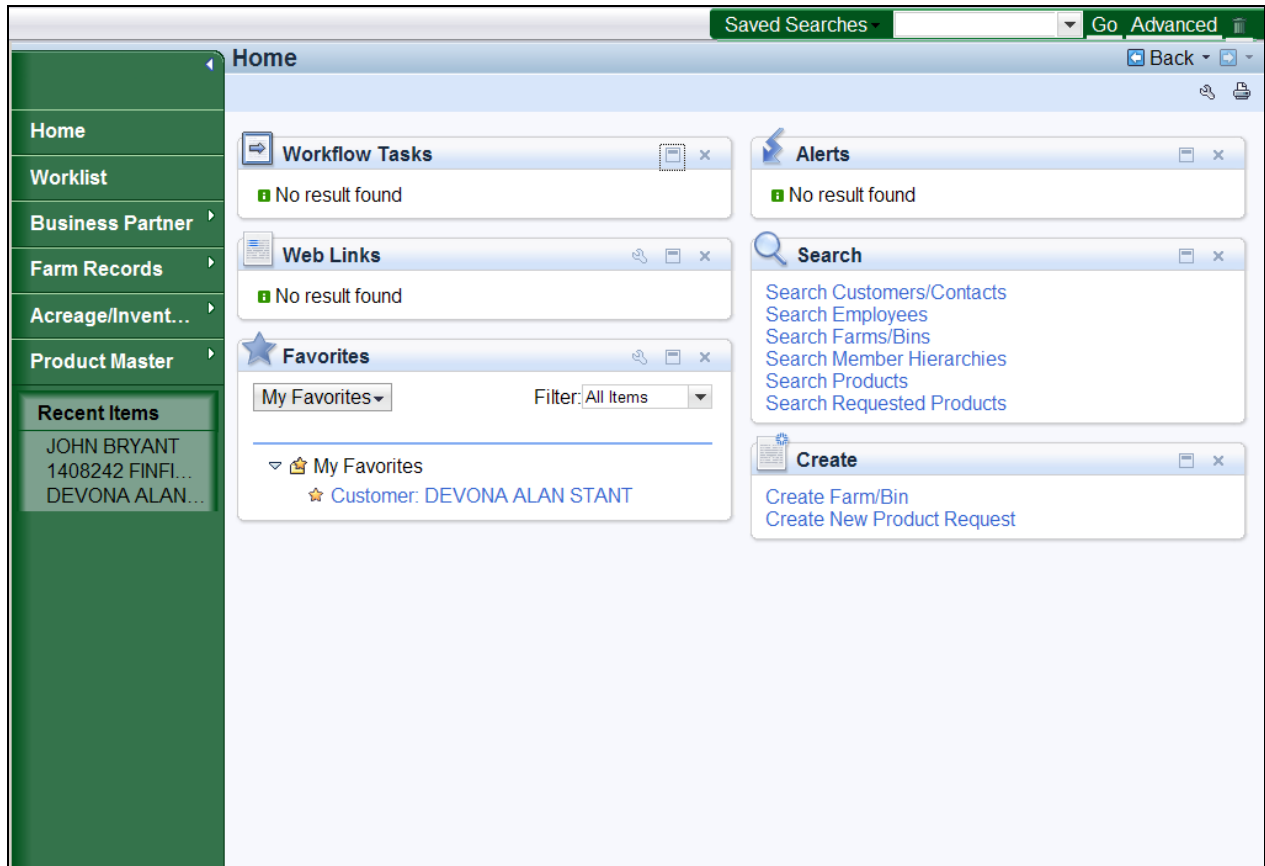


You have accessed the Customer Business Partner Record. You will learn more about Business Partner in the Business Partner View course.

20. Click Home **Home** button to return to the CRM Homepage.



## Home



21. Click  **Workflow Tasks** to proceed

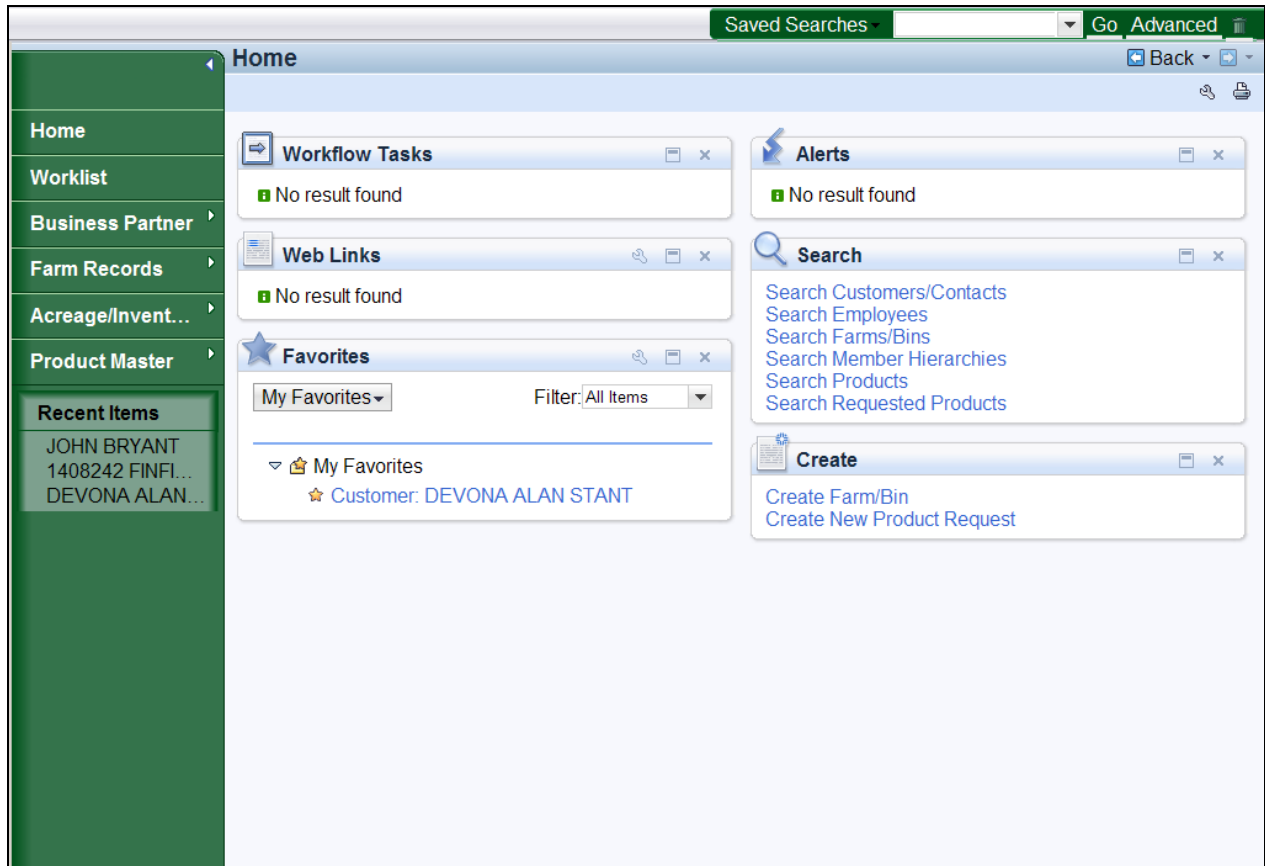


Assignment Blocks on the CRM homepage consists of quick and easy hyperlinks to access your daily tasks.






## MIDAS CRM Favorites Assignment Block




22. Click control **Favorites**.

 The Favorites Assignment Block allows you to save your commonly used customers, products, or farms directly on your homepage

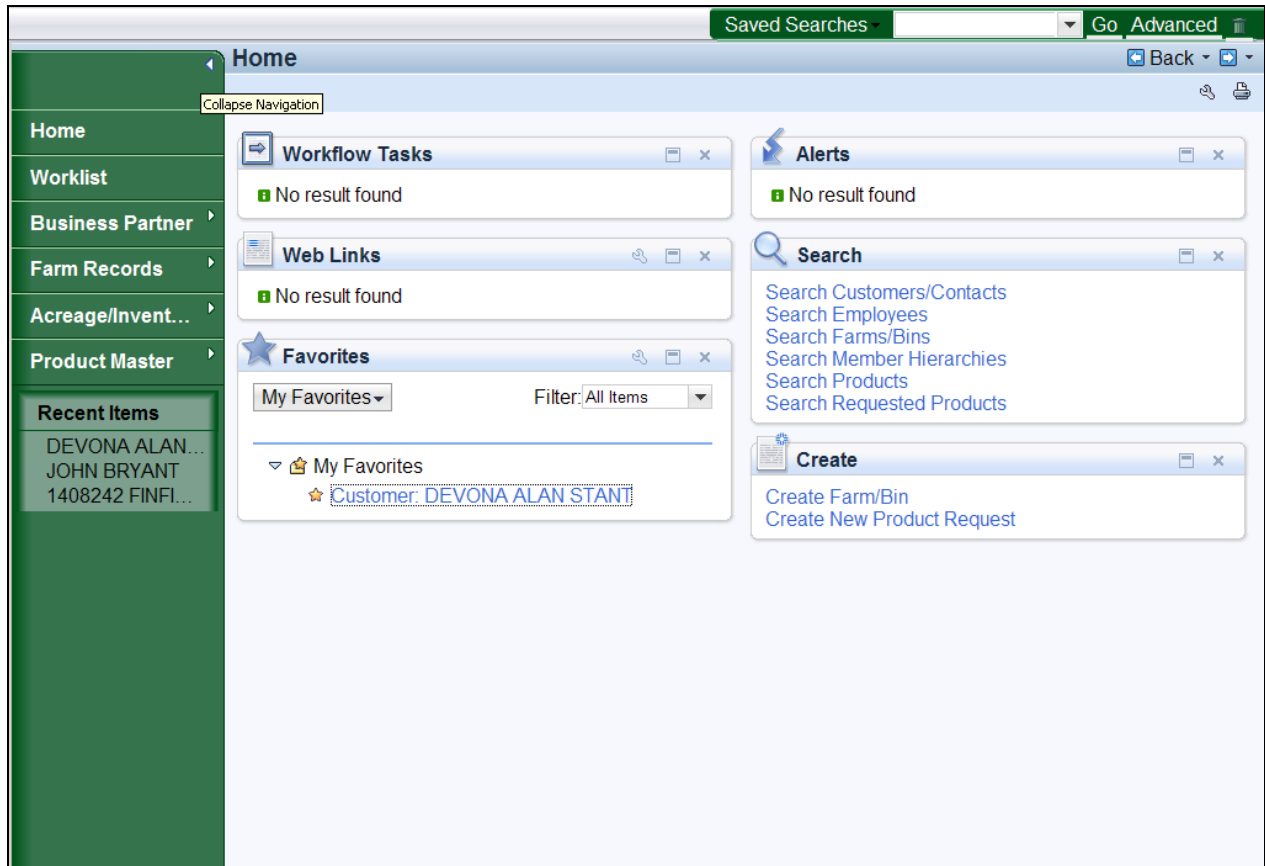
23. Click Customer: DEVONA ALAN STANT link

[Customer: DEVONA ALAN STANT](#).


 To view a favorite simply select the hyperlink in the assignment block.



## MIDAS CRM Homepage

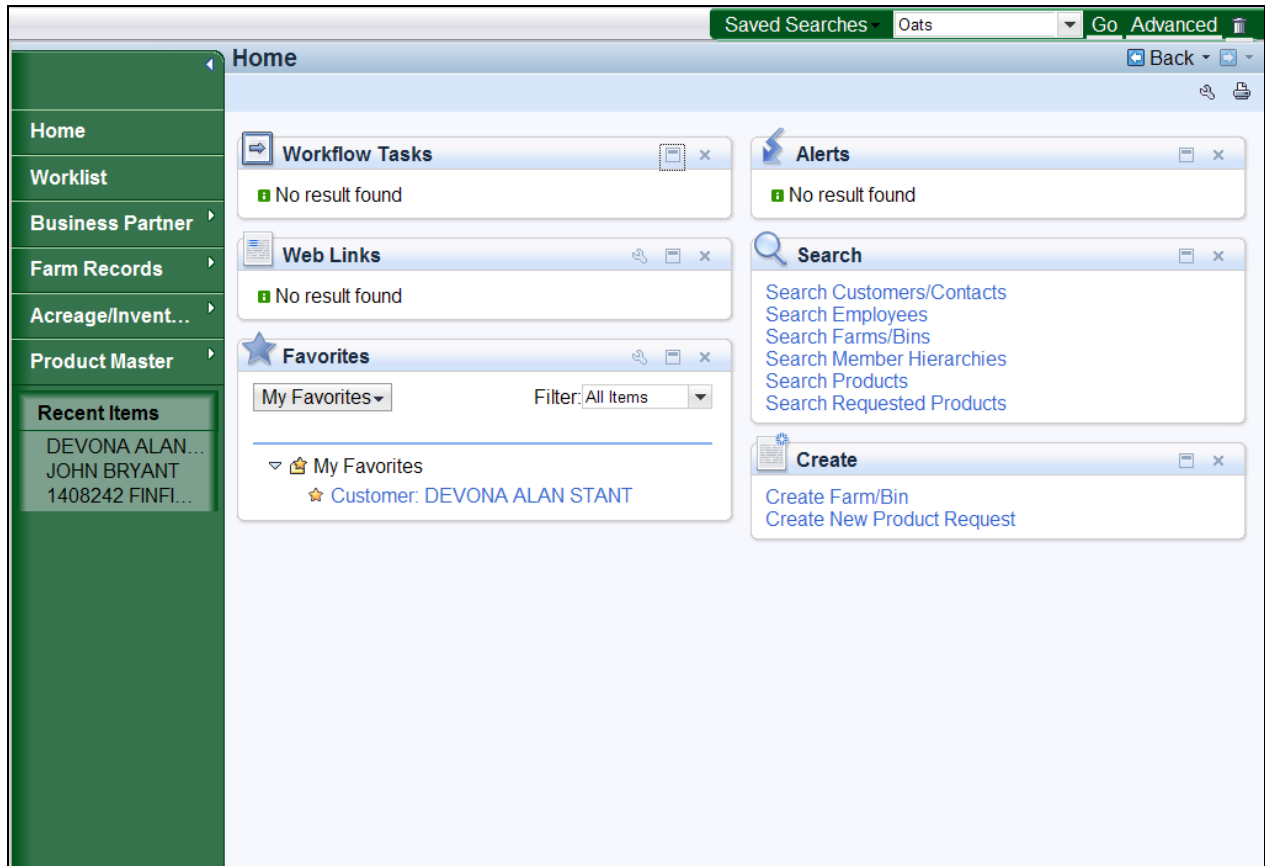


24. Click Collapse Navigation  button to expand the CRM Homepage


25.  Click Expand Navigation  button



## MIDAS CRM Homepage Saved Searches




26. Click Saved Searches **Saved Searches** button.

 The Saved Searches allow you to store queries or common searches on your homepage. Saved Searches will be discussed in Lesson 4

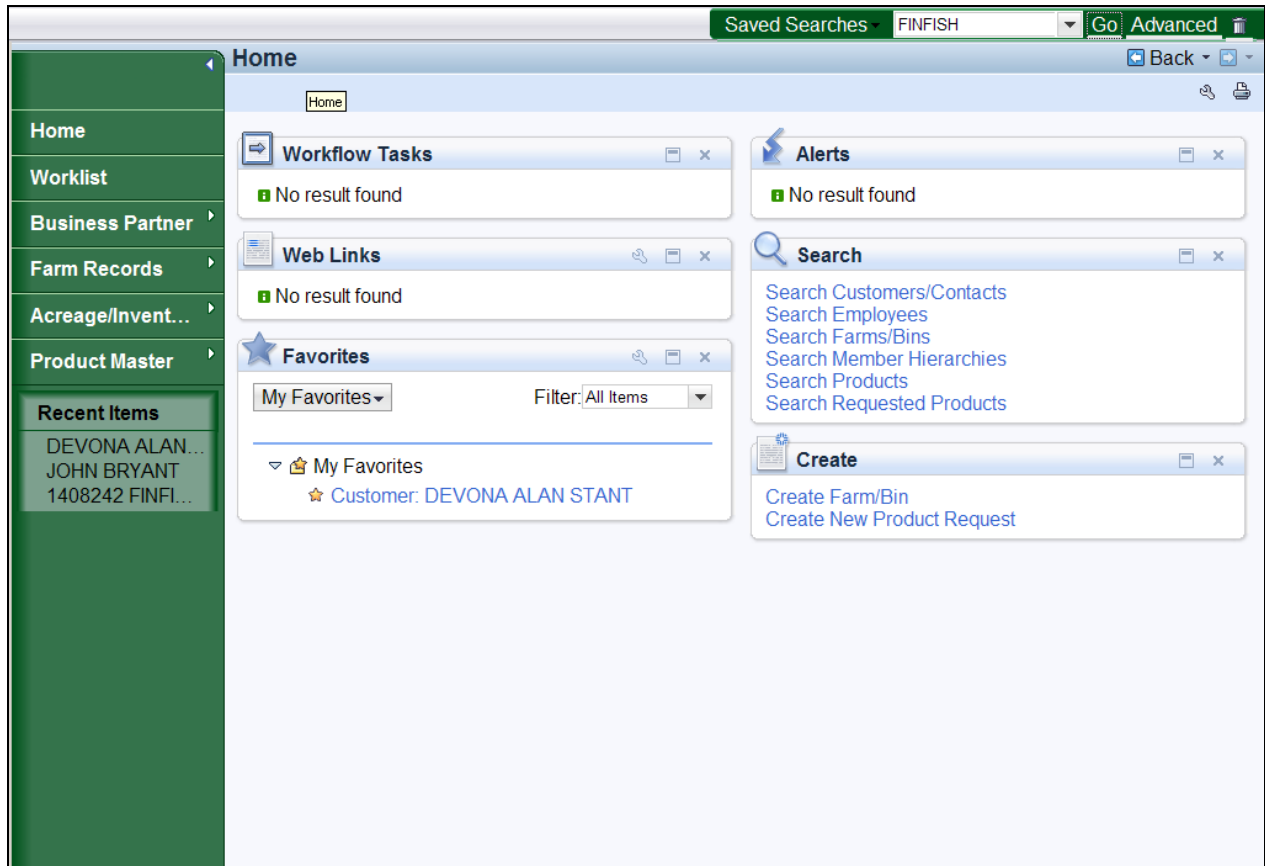
27. Click the Saved Search dropdown list **Oats**.

28. Click the FINFISH **FINFISH** Saved Search from the list.


 After the saved search is selected, click the Go button to run the Saved Search. You will create and run a saved search in Lesson 4.



## Home



29. Click Home  button.

 You have successfully Navigated the MIDAS CRM Homepage.



## Result

You have successfully navigated the MIDAS CRM homepage.

